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**MARKET ACCESS SECRETARIAT**
**Global Analysis Report**

# *Sector Trend Analysis*

# Sugar Confectionery
# In Belgium

**January 2017**

## EXECUTIVE SUMMARY

This report brings together consumer insight and market data to provide a comprehensive brief of the sugar confectionery sector in Belgium to Canadian exporters. This allows for the rapid identification of key growth opportunities across major sugar confectionery categories. It also provides market share of the key distribution channels. Finaly, the report includes brand share data of the Confectionery market in Belgium.

Currently, imports of sugar confectionery into the European Union (E.U.) face tariffs starting at 6.2%. Canadian sugar confectionery exports will enter the E.U. duty free immediately upon entry into force of the Comprehensive Economic and Trade Agreement (CETA). Under CETA, certain exports of Canadian sugar confectionery will also have access to Origin Quotas (which provide more liberal rules of origin), including an Origin Quota of 10,000 tonnes for Sugar Confectionery and Chocolate Preparations such as bubble gum, sugar candies, and chocolate confectionery.

According to Euromonitor, the Belgian sugar confectionery sector reached US$317.4 million in 2015. This represents 7.9% growth or US$23.1 million since 2010. In the forecast, the sugar confectionery sector is predicted to reach close to US$325.1 million by 2021, with an estimated growth of 1.8%. High growth categories in the forecast include medicated confectionery, mints losanges and pastilles, gums, jellies and chews.

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## CONSUMER ATTITUDES AND ECONOMIC DRIVERS

As in other European countries, the population in Belgium is aging, which is having a major impact on consumption trends. People in Belgium are expected to continue to live longer, while birth rates are expected to continue to decline. Another particularity of the Belgian market is that the number of single-person households is expected to increase.

According to Euromonitor, the purchasing habits of the Belgian consumers are becoming more in line with the rest of European nations, and this is reflected in the increased demand for indulgence and luxury products, including confectionery items.

While pleasure, indulgence and impulse remain key demand drivers for sugar confectionery in Belgium, the importance of on-the-go consumption is paradigm for the sector. Furthermore, smaller portions do not only drive value, they also give manufacturers significant room for innovation and new products introduction.

While manufacturers focus on new launches of sugar-free products, interest in gluten-free sugar confectionery increased in 2016. The gluten-free segment is still a niche; however, it is set to grow rapidly according to Euromonitor.

## RETAIL SALES

Sugar confectionery in Belgium saw several new launches in 2015. At the same time, the category's growth potential was negatively affected by increasing health concerns and rising obesity. As a result, sugar confectionery posted only moderate current value growth of 1% in 2015, while volume sales remained flat.

**Historic Retail Value Sales of Sugar Confectionery in Belgium, in US$ Millions**

| Category | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | Market Share (%) | CAGR (%) 2010-15 |
|---|---|---|---|---|---|---|---|---|
| Sugar Confectionery | 294.3 | 300.7 | 307.9 | 312.5 | 315.1 | 317.4 | - | 1.5 |
| Pastilles, gums, jellies and chews | 106.4 | 108.9 | 111.4 | 113.1 | 114.0 | 115.0 | 36.2 | 1.6 |
| Mints | 45.3 | 46.9 | 48.0 | 49.2 | 50.1 | 50.8 | 16.0 | 2.3 |
| Medicated confectionery | 47.2 | 47.7 | 48.8 | 49.7 | 50.1 | 50.5 | 15.9 | 1.4 |
| Toffees, caramels and nougat | 41.7 | 42.0 | 43.1 | 43.5 | 43.4 | 43.4 | 13.7 | 0.8 |
| Boiled sweets | 25.3 | 26.5 | 27.2 | 27.5 | 27.8 | 27.9 | 8.8 | 2.0 |
| Other sugar confectionery | 19.1 | 19.4 | 19.8 | 19.9 | 20.0 | 20.1 | 6.3 | 1.0 |
| Lollipops | 7.6 | 7.7 | 7.8 | 7.9 | 7.9 | 8.0 | 2.5 | 1.0 |
| Liquorice | 1.8 | 1.8 | 1.8 | 1.8 | 1.8 | 1.8 | 0.6 | 0.0 |

**Source:** Euromonitor, 2016

**Historic Retail Volume Sales of Sugar Confectionery in Belgium, in 000' Tonnes**

| Category | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
|---|---|---|---|---|---|---|
| Sugar Confectionery | 29.6 | 29.5 | 29.2 | 29.0 | 28.8 | 28.6 |
| Pastilles, gums, jellies and chews | 16.3 | 16.0 | 15.9 | 15.8 | 15.6 | 15.5 |
| Mints | 4.6 | 4.6 | 4.5 | 4.4 | 4.3 | 4.3 |
| Medicated confectionery | 2.3 | 2.4 | 2.4 | 2.4 | 2.4 | 2.4 |
| Toffees, caramels and nougat | 2.0 | 2.1 | 2.1 | 2.1 | 2.1 | 2.1 |
| Boiled sweets | 2.0 | 2.0 | 2.0 | 2.0 | 2.0 | 1.9 |
| Other sugar confectionery | 1.8 | 1.7 | 1.7 | 1.7 | 1.7 | 1.7 |
| Lollipops | 0.6 | 0.6 | 0.6 | 0.6 | 0.6 | 0.6 |
| Liquorice | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 |

**Source for both:** Euromonitor, 2016

Euromonitor forecast that the sugar confectionery volume sales are likely to stay static over the 2016 to2021 period. However, pleasure-seeking and health and wellness products will become increasingly appealing and indicate margin for growth for sugar confectionery, especially in terms of retail value sales.

**Forecast Retail Value Sales of Sugar Confectionery in Belgium, in US$ Millions**

| Category | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | Market Share (%) | CAGR (%) 2016-21 |
|---|---|---|---|---|---|---|---|---|
| Sugar Confectionery | 319.4 | 325.3 | 330.9 | 337.7 | 345.9 | 354.4 | 100.0 | 2.1 |
| Pastilles, gums, jellies and chews | 115.8 | 118.0 | 120.1 | 122.5 | 125.5 | 128.5 | 36.3 | 2.1 |
| Mints | 51.5 | 52.7 | 53.9 | 55.3 | 56.9 | 58.6 | 16.5 | 2.6 |
| Medicated confectionery | 51.0 | 52.3 | 53.6 | 55.1 | 56.7 | 58.3 | 16.5 | 2.7 |
| Toffees, caramels and nougat | 43.3 | 43.7 | 44.0 | 44.5 | 45.3 | 46.2 | 13.0 | 1.3 |
| Boiled sweets | 28.1 | 28.6 | 29.0 | 29.6 | 30.3 | 31.1 | 8.8 | 2.0 |
| Other sugar confectionery | 20.0 | 20.2 | 20.4 | 20.6 | 20.9 | 21.2 | 6.0 | 1.2 |
| Lollipops | 8.0 | 8.1 | 8.1 | 8.3 | 8.4 | 8.6 | 2.4 | 1.5 |
| Liquorice | 1.8 | 1.8 | 1.8 | 1.8 | 1.9 | 1.9 | 0.5 | 1.1 |

While Euromonitor data shows slow volume growth in the Belgian market, the values are still reporting modest growth indicating a move to higher priced products.

**Forecast Retail Volume Sales of Sugar Confectionery in Belgium, in 000' Tonnes**

| Category | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|---|---|---|---|---|---|---|
| Sugar Confectionery | 28.40 | 28.20 | 27.90 | 27.70 | 27.50 | 27.40 |
| Pastilles, gums, jellies and chews | 15.40 | 15.30 | 15.30 | 15.20 | 15.10 | 15.00 |
| Mints | 4.20 | 4.20 | 4.10 | 4.10 | 4.10 | 4.00 |
| Medicated confectionery | 2.40 | 2.30 | 2.30 | 2.30 | 2.30 | 2.30 |
| Toffees, caramels and nougat | 2.10 | 2.10 | 2.10 | 2.10 | 2.10 | 2.10 |
| Boiled sweets | 1.90 | 1.90 | 1.90 | 1.90 | 1.90 | 1.90 |
| Other sugar confectionery | 1.60 | 1.60 | 1.60 | 1.50 | 1.50 | 1.50 |
| Lollipops | 0.60 | 0.60 | 0.50 | 0.50 | 0.50 | 0.50 |
| Liquorice | 0.10 | 0.10 | 0.10 | 0.10 | 0.10 | 0.10 |

**Source for both:** Euromonitor, 2016

Globally, consumers are becoming ever more demanding of their sweets. Belgian consumers want premium indulgence with health benefits. Manufacturers are certainly eager to add value to their products, but while some of their health and wellness-oriented offerings enjoy global appeal, others remain confined to niche markets.

**Key Functional Ingredients Historical Retail Value Sales (%) breakdown**

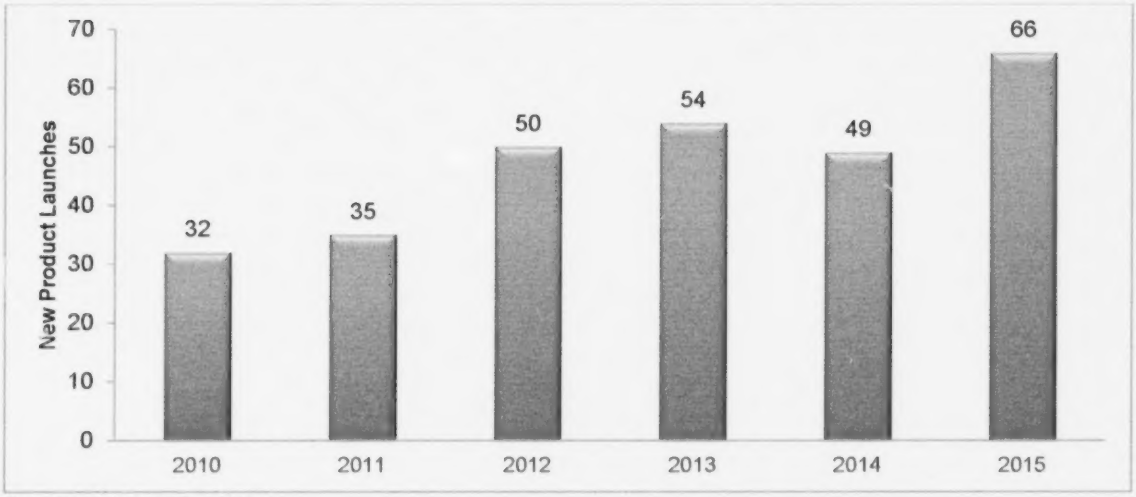
| Key Functional Ingredients | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
|---|---|---|---|---|---|---|
| Herb extracts | 19.0 | 18.9 | 18.9 | 18.8 | 18.6 | 18.5 |
| Multivitamins | 10.0 | 10.1 | 10.2 | 10.3 | 10.4 | 10.5 |
| Vitamin C | 7.0 | 7.2 | 7.3 | 7.4 | 7.6 | 7.7 |
| Calcium with/without vitamin D | 4.7 | 4.6 | 4.6 | 4.4 | 4.3 | 4.3 |

**Source:** Euromonitor, 2016

## NEW SUGAR CONFECTIONERY PRODUCTS IN BELGIUM

From January 2010 to December 2015, there were 286 sugar confectionery new products launched in Belgium. The number of sugar confectionery new product introduction in Belgium has fluctuated over the last five years, and has increased in 2015 to a high of 66 new products. In 2010, 32 new product were launches.

**New Sugar Confectionery Products Launches by Year, from January 2010 to December 2015**




**Source:** Mintel GNPD, 2016

In 2015, the low/no/reduced allergen and gluten-free claims saw the largest number of new product introductions with ten new products for each claim. The "low/no/reduced sugar", "age group specific" and "no additives/preservatives" claims includs five new products each. These 5 claims represented 53% of all sugar confectionery launches in 2015.

**New Sugar Confectionery Products Launches by Claim, from January 2010 to December 2015**

| Claim | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
|---|---|---|---|---|---|---|
| Total new products | 32 | 35 | 50 | 54 | 49 | 66 |
| Low/no/reduced allergen | 4 | 0 | 5 | 0 | 7 | 10 |
| Gluten-free | 4 | 0 | 5 | 0 | 6 | 10 |
| Low/no/reduced sugar | 15 | 18 | 29 | 14 | 11 | 5 |
| Children (5-12) | 4 | 2 | 0 | 2 | 11 | 5 |
| No additives/preservatives | 2 | 1 | 2 | 2 | 7 | 5 |

**Source:** Mintel GNPD, 2016

Increasing concerns regarding sugar consumption may have an impact on sugar confectionery. However, sugar-free products, medicated confectionery and mints are expected to grow steadily.

As Belgian consumers become more health-conscious, the development of broader sugar-free offerings will be very important for the success of sugar confectionery. Gluten-free sugar confectionery is also attracting an increasing demand, and represents an interesting growth driver for manufacturers.

When it comes to new flavours and ingredients, Belgian consumers are fairly conservative, traditional flavours remain popular in Belgium, with fruit varieties dominating the market, followed by mint and strawberry.

**Top 10 New Sugar Confectionery Products Launches by Flavour, from January 2010 to December 2015**

| Flavour | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
|---|---|---|---|---|---|---|
| Fruit | 2 | 3 | 3 | 8 | 9 | 7 |
| Mint | 5 | 3 | 8 | 2 | 2 | 5 |
| Strawberry | 2 | 2 | 6 | 2 | 7 | 6 |
| Orange | 0 | 1 | 4 | 4 | 2 | 6 |
| Peppermint | 1 | 2 | 6 | 1 | 1 | 0 |
| Apple | 1 | 0 | 2 | 0 | 3 | 5 |
| Sour | 0 | 1 | 1 | 1 | 5 | 2 |
| Multiple Flavour | 0 | 1 | 1 | 1 | 1 | 6 |
| Cola | 0 | 1 | 2 | 1 | 2 | 3 |
| Lemon | 1 | 0 | 2 | 1 | 1 | 4 |

**Source:** Mintel GNPD, 2016

The price growth rate has been slow and modest, but remained in positive territory because these products can deliver on indulgency at a modest price.

**Historic Retail Value Sales of Sugar Confectionery in Belgium, Unit Price in US$ per Kilogram**

| Category | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 |
|---|---|---|---|---|---|---|---|
| Medicated confectionery | 23.6 | 23.9 | 24.7 | 25.3 | 25.7 | 26.0 | 26.4 |
| Mints | 23.1 | 23.4 | 23.7 | 24.1 | 24.5 | 24.7 | 25.1 |
| Lollipops | 13.6 | 13.7 | 14.1 | 14.4 | 14.6 | 14.8 | 14.9 |
| Liquorice | 13.4 | 13.6 | 14.0 | 14.2 | 14.4 | 14.6 | 14.8 |
| Other sugar confectionery | 10.9 | 11.2 | 11.5 | 11.8 | 12.0 | 12.1 | 12.3 |
| Boiled sweets | 11.1 | 11.3 | 11.6 | 11.7 | 11.9 | 12.0 | 12.1 |
| Sugar confectionery | 10.0 | 10.3 | 10.6 | 10.9 | 11.0 | 11.2 | 11.3 |
| Toffees, caramels and nougat | 9.3 | 9.3 | 9.8 | 10.0 | 10.2 | 10.3 | 10.3 |
| Pastilles, gums, jellies and chews | 6.6 | 6.8 | 7.0 | 7.2 | 7.3 | 7.4 | 7.5 |

**Source:** Euromonitor, 2016

## DISTRIBUTION CHANNELS

The purchase of sugar confectionery relies on classic impulse triggers. Almost three out of four consumers admit to buying the sugar confectionery on impulse, thus at the point-of-sale indicating that the product visibility and strategic in-store positioning are paramount.

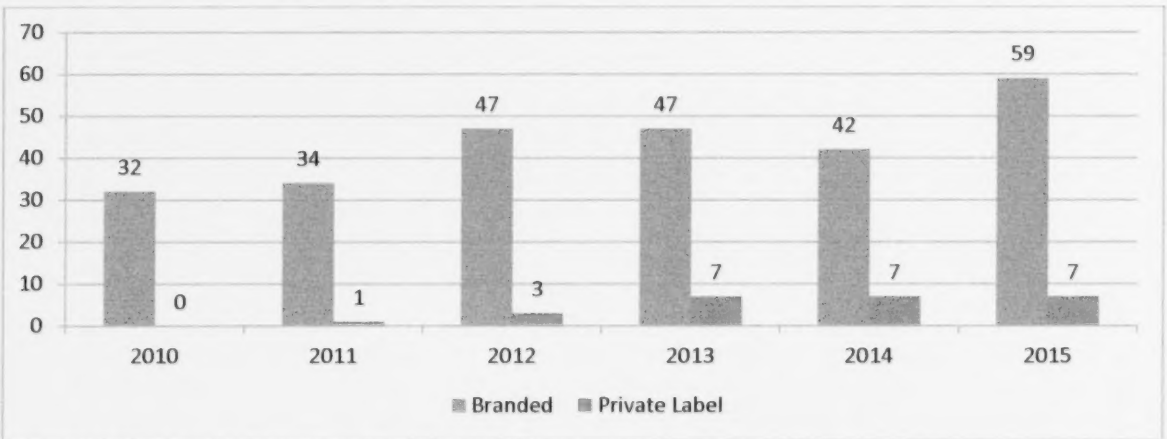
The internet-retailing channel accounted for just 3% of sugar confectionery's total retail value sales in 2016. However, the importance of the internet-retailing channel is growing rapidly.

**Distribution Channels of Sugar Confectionery Products by %**

| Outlets | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 |
|---|---|---|---|---|---|---|
| Store-Based Retailing | 89.6 | 89.5 | 89.2 | 88.9 | 88.8 | 88.7 |
| Grocery Retailers | 75.3 | 75.2 | 74.8 | 74.4 | 74.4 | 74.2 |
| Modern Grocery Retailers | 64.3 | 64.2 | 64.2 | 64.0 | 64.1 | 64.1 |
| Convenience Stores | 6.3 | 6.2 | 6.0 | 5.9 | 5.9 | 6.0 |
| Discounters | 10.6 | 10.7 | 10.7 | 10.8 | 10.9 | 10.9 |
| Forecourt Retailers | 3.3 | 3.2 | 3.2 | 3.0 | 2.9 | 2.8 |
| Hypermarkets | 5.8 | 5.5 | 5.2 | 5.2 | 5.1 | 5.1 |
| Supermarkets | 38.4 | 38.7 | 39.0 | 39.2 | 39.3 | 39.3 |
| Traditional Grocery Retailers | 11.1 | 10.9 | 10.7 | 10.4 | 10.3 | 10.1 |
| Food/drink/tobacco specialists | 4.7 | 4.6 | 4.6 | 4.5 | 4.4 | 4.4 |
| Independent Small Grocers | 5.0 | 4.9 | 4.8 | 4.8 | 4.8 | 4.7 |
| Other Grocery Retailers | 1.5 | 1.4 | 1.3 | 1.1 | 1.1 | 1.1 |
| Non-Grocery Specialists | 14.2 | 14.3 | 14.4 | 14.4 | 14.5 | 14.5 |
| Health and Beauty Specialist Retailers | 14.2 | 14.3 | 14.4 | 14.4 | 14.5 | 14.5 |
| Mixed Retailers | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| Non-Store Retailing | 10.4 | 10.5 | 10.8 | 11.1 | 11.1 | 11.3 |
| Vending | 8.9 | 8.8 | 8.8 | 8.8 | 8.7 | 8.6 |
| Internet Retailing | 1.5 | 1.7 | 2.0 | 2.3 | 2.5 | 2.8 |

**Source:** Euromonitor, 2016

**New Sugar Confectionery Products Launches by Branded vs Private Label, from January 2010 to December 2015**




**Source:** Mintel GNPD, 2016

In Belgium, premium brands strive for innovation with products that are mainly geared to adults and young adults demographics, while value for money brands focus on younger target groups, with products such as lollipops and boiled sweets.

Discounters' private label products, in particular, experienced steady growth in 2015 and projected to increase even more 2016 as their low prices and strong promotions proved to be very attractive to low- to middle-income households according to Mintel.

**Example of Price Point of Sugar Confectionery Products as of February 2016**

| Category | Brands | Company name | Outlets | Pack size | Price (EUR) | Price (US$) |
|---|---|---|---|---|---|---|
| Boiled Sweets | Carrefour | Carrefour Belgium SA/NV | Supermarket | 250 g | 1.29 | 1.44 |
| Boiled Sweets | Colruyt | Etn Franz Colruyt NV | Internet retailing | 600 g | 3.17 | 3.55 |
| Boiled Sweets | Delhaize | Delhaize 'Le Lion' SA | Supermarket | 120 g | 2.19 | 2.45 |
| Boiled Sweets | Fruit-tella Cream | Perfetti Van Melle Group | Internet retailing | 160 g | 1.95 | 2.18 |
| Boiled Sweets | Kathy | Confiserie Kathy | Supermarket | 200 g | 2.25 | 2.52 |
| Liquorice | Carrefour | Carrefour Belgium SA/NV | Supermarket | 150 g | 1.49 | 1.67 |
| Liquorice | Curix | Usines Jean Warnimont SA | Supermarket | 42 units | 1.49 | 1.67 |
| Liquorice | Delhaize | Delhaize 'Le Lion' SA | Supermarket | 225 g | 1.69 | 1.89 |
| Liquorice | Look-O-Look Réglisse | Look-O-Look International BV | Supermarket | 135 g | 1.99 | 2.23 |
| Lollipops | Carrefour | Carrefour Belgium SA/NV | Supermarket | 200 g | 1.99 | 2.23 |
| Lollipops | Chupa Chups | Chupa Chups (Grupo) SA | Supermarket | 192 g | 1.53 | 1.71 |
| Lollipops | Colruyt | Etn Franz Colruyt NV | Supermarket | 500 g | 1.98 | 2.22 |
| Medicated Confectionery | Anta Flu | Pervasco BV | Supermarket | 300 g | 2.71 | 3.04 |
| Medicated Confectionery | Ricola | Solinest SA | Supermarket | 50 g | 1.70 | 1.90 |
| Medicated Confectionery | Vichy | Cadbury Belgium NV | Supermarket | 125 g | 1.69 | 1.89 |
| Medicated Confectionery | Vicks | Procter & Gamble Eurocor NV SA | Supermarket | 75 g | 1.85 | 2.07 |
| Power Mints | Delhaize | Delhaize 'Le Lion' SA | Supermarket | 175 g | 1.49 | 1.67 |
| Power Mints | Frisk | Frisk International NV | Supermarket | 35 g | 2.09 | 2.34 |
| Power Mints | King Extra Strong | Lamy Lutti NV | Supermarket | 4 x 44 g | 1.09 | 1.22 |
| Standard Mints | Carrefour | Carrefour Belgium SA/NV | Supermarket | 150 g | 1.49 | 1.67 |
| Standard Mints | Delhaize | Delhaize 'Le Lion' SA | Supermarket | 175 g | 1.49 | 1.67 |
| Standard Mints | Hartmint | Confiserie Trefin NV | Supermarket | 200 g | 1.35 | 1.51 |
| Pastilles, Gums, Jellies and Chews | Aldi | Aldi NV/SA | Supermarket | 250 g | 0.99 | 1.11 |
| Pastilles, Gums, Jellies and Chews | Carrefour | Carrefour Belgium SA/NV | Supermarket | 250 g | 1.09 | 1.22 |
| Pastilles, Gums, Jellies and Chews | Colruyt | Etn Franz Colruyt NV | Supermarket | 500 g | 1.34 | 1.50 |
| Pastilles, Gums, Jellies and Chews | Delhaize | Delhaize 'Le Lion' SA | Supermarket | 250 g | 1.69 | 1.89 |
| Pastilles, Gums, Jellies and Chews | Fruit-tella | Perfetti Van Melle Group | Supermarket | 500 g | 3.69 | 4.13 |
| Toffees, Caramels and Nougat | Aldi | Aldi NV/SA | Supermarket | 400 g | 1.69 | 1.89 |
| Toffees, Caramels and Nougat | Caramel Van Melle | Frisk International NV | Supermarket | 250 g | 1.05 | 1.18 |
| Toffees, Caramels and Nougat | Carrefour | Carrefour Belgium SA/NV | Supermarket | 280 g | 1.85 | 2.07 |
| Other Sugar Confectionery | Delhaize | Delhaize 'Le Lion' SA | Supermarket | 500 g | 1.39 | 1.56 |
| Other Sugar Confectionery | Dulcia | Haribo GmbH & Co KG | Supermarket | 400 g | 3.68 | 4.12 |

**Source:** Euromonitor, 2016

## NEW PRODUCT EXAMPLES

**Product Description**
Napoleon Sinaspur Orange (orange flavoured boiled sweets) is an orange flavoured candy layered with sherbet powder

**Orange Flavoured Boiled Sweets**

| | |
|---|---|
| **Company:** | Confiserie Napoleon |
| **Brand:** | Napoleon |
| **Category:** | Sugar & Gum Confectionery |
| **Sub-Category:** | Boiled Sweets |
| **Country:** | Belgium |
| **Store Name:** | AD Delhaize |
| **Date Published:** | Dec 2015 |
| **Launch Type:** | New Variety/Range Extension |
| **Price in US$ :** | 2.09 |

**Product Description**
Mentos NOWmints Micro-confiserie (sugar-free mini mints) has a sweet mint flavour. It retails in a 18g pack.

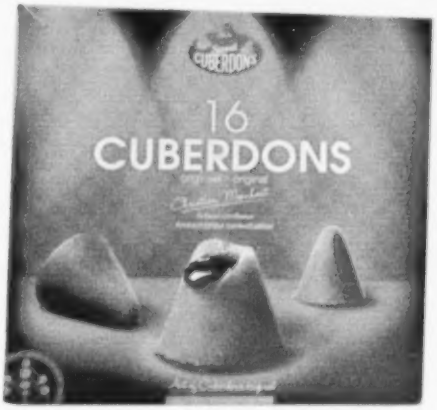
**Sugar-Free Mini Mints**

| | |
|---|---|
| **Company:** | Perfetti Van Melle |
| **Brand:** | Mentos NOWmints |
| **Category:** | Sugar & Gum Confectionery |
| **Sub-Category:** | Standard & Power Mints |
| **Country:** | Belgium |
| **Store Name:** | AD Delhaize |
| **Launch Type:** | New Product |
| **Price in US$:** | 1.83 |

**Product Description**
Sweet Cuberdons (Handcrafted belgian cuberdon) is typical cone-shaped Belgian candy with a slightly firm exterior and very smooth heart.

**Handcrafted Belgian Cuberdon**

| | |
|---|---|
| **Company:** | Les Bonbons à l'Ancienne |
| **Brand:** | Sweet Cuberdons |
| **Category:** | Sugar & Gum Confectionery |
| **Sub-Category:** | Other Sugar Confectionery |
| **Country:** | Belgium |
| **Country of Manufacture:** | Belgium |
| **Launch Type:** | New Product |
| **Price in US$:** | 4.38 |




**Product Description**
Look O Look mixed assortment confectionery sweets are potato chip shaped candy.

**Mixed Assortment Confectionery Sweets**

| | |
|---|---|
| **Company:** | Look-O-Look |
| **Brand:** | Look O Look |
| **Category:** | Sugar & Gum Confectionery |
| **Sub-Category:** | Mixed Assortments |
| **Country:** | Belgium |
| **Launch Type:** | New Variety/Range Extension |
| **Price in US$:** | 2.52 |

**Product Description**
Dills Pastilles à la Menthe sans Sucre (Digestive Sugar-Free Mints) have been repackaged with a new design. The product is said to make things digestible, and retails in a pack containing two 15g units.

**Digestive Sugar-Free Mints**

| | |
|---|---|
| **Company:** | DILLS |
| **Distributor:** | DILLS |
| **Brand:** | Dills |
| **Category:** | Sugar & Gum Confectionery |
| **Sub-Category:** | Standard & Power Mints |
| **Country:** | Belgium |
| **Country of Manufacture:** | Belgium |
| **Launch Type:** | New Packaging |
| **Price in US$:** | 3.78 |

## TARRIF SCHEDULE

Please note: Certain sugar confectionery goods are subject to additional EU tariffs determined on the basis of the content of milkfat, milk proteins, sucrose, invert sugar, isoglucose, glucose and/or starch of the products.

| HS Code | Description | Conventional rate of duty (%) |
|---|---|---|
| 1704 | Sugar confectionery (including white chocolate), not containing cocoa | |
| 1704 10 | – Chewing gum, whether or not sugar-coated | |
| 1704 10 10 | – – Containing less than 60 % by weight of sucrose (including invert sugar expressed as sucrose) | 6,2 + 27,1 €/100 kg/net MAX 17,9 |
| 1704 10 90 | – – Containing 60 % or more by weight of sucrose (including invert sugar expressed as sucrose) | 6,3 + 30,9 €/100 kg/net MAX 18,2 |
| 1704 90 | – Other | |
| 1704 90 10 | – – Liquorice extract containing more than 10 % by weight of sucrose but not containing other added substances | 13,4 |
| 1704 90 30 | – – White chocolate | 9,1 + 45,1 €/100 kg/net MAX 18,9 + 16,5 €/100 kg/net |
| | – – Other | |
| 1704 90 51 | – – – Pastes, including marzipan, in immediate packings of a net content of 1 kg or more | 9 + EA MAX 18,7 + AD S/Z* |
| 1704 90 55 | – – – Throat pastilles and cough drops | 9 + EA MAX 18,7 + AD S/Z* |
| 1704 90 61 | – – – Sugar-coated (panned) goods | 9 + EA MAX 18,7 + AD S/Z* |
| | – – – Other | |
| 1704 90 65 | – – – – Gum confectionery and jelly confectionery, including fruit pastes in the form of sugar confectionery | 9 + EA MAX 18,7 + AD S/Z* |
| 1704 90 71 | – – – – Boiled sweets, whether or not filled | 9 + EA MAX 18,7 + AD S/Z* |
| 1704 90 75 | – – – – Toffees, caramels and similar sweets | 9 + EA MAX 18,7 + AD S/Z* |
| | – – – – Other | |
| 1704 90 81 | – – – – – Compressed tablets | 9 + EA MAX 18,7 + AD S/Z* |
| 1704 90 99 | – – – – – Other | 9 + EA MAX 18,7 + AD S/Z* |

Source: http://eur-lex.europa.eu/legal-content/EN/TXT/HTML/?uri=OJ:L:2010:284:FULL&from=EN *additional duties for sugar (AD S/Z)

## CONCLUSION

It is likely that Belgian confectionery sector will continue to be interested in innovative sugar confectionery products with added benefits. More and more Belgian consumers are willing to pay a premium price for quality food with healthy ingredients and especially impulse products, as these consumers are increasingly interested in their health. This makes Belgium a potentially attractive market for Canadian exporters of high-quality sugar confectionery products.

Euromonitor data indicates that opportunities for Canadian confectionery products may reside with products focused on health-related positioning, such as naturalness (organic or no additives and preservatives) and purity (simple and clear ingredient lists with limited or no chemicals added).

## FOR MORE INFORMATION

International Trade Commissioners can provide Canadian industry with on-the-ground expertise regarding market potential, current conditions and local business contacts, and are an excellent point of contact for export advice.

- **Overview of Trade Commissioner Services in Belgium**
  http://tradecommissioner.gc.ca/belgium-belgique/index.aspx?lang=eng

- **Find a Trade Commissioner**
  www.tradecommissioner.gc.ca/eng/find-trade-contacts.jsp

For additional intelligence on this and other markets, the complete library of Global Analysis reports can be found under *Statistics and Market Information* at the following link, arranged by sector and region of interest:

- ats-sea.agr.gc.ca

## RESOURCES


Euromonitor International, 2016. *Consumer Lifestyles in Belgium*.

Euromonitor International, 2016. *Sugar Confectionery in Belgium*.

Mintel Global New Products Database, 2016.

EU regulations:
http://eur-lex.europa.eu/legal-content/EN/ALL/?uri=OJ%3AL%3A2010%3A284%3ATOC

***Sector Trend Analysis:*** Confectionery in Belgium

*Global Analysis Report*

Prepared by: Karim Zarrouki, Market Analyst

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